

# **Plan Activity**



### **Participant Distribution Statistics**

### Amount of Withdrawals Taken

### # of Withdrawals

	1/1/2019 -	1/1/2020 -			1/1/2019 -	1/1/2020 -		
Distribution Type	12/31/2019	12/31/2020	Change	% Change	12/31/2019	12/31/2020	Change	% Change
Termination	\$2,338,484	\$1,993,943	(\$344,541)	-15%	289	240	(49)	-17%
Death Distribution	\$1,243,897	\$825,071	(\$418,826)	-34%	174	93	(81)	-47%
Required Minimum Distribution	\$1,367,063	\$506,228	(\$860,834)	-63%	599	190	(409)	-68%
Installment Payment	\$431,529	\$321,159	(\$110,370)	-26%	446	404	(42)	-9%
Gross Adjustment	\$21	\$3	(\$18)	-87%	2	1	(1)	-50%
In-Service Withdraw al	\$57,683	-\$66,808	(\$124,491)	-216%	33	8	(25)	-76%
Grand Total	\$5,438,676	\$3,579,596	(\$1,859,080)	-34%	1,543	936	(607)	-39%

1/1/2020 - 12/31/2020								
	Amount of Withdraw als Taken # of Withdraw als							
Distribution Sub-Type	Age < 50	Age >= 50	Total	Age < 50 Age >= 50 Tota				
Rollover	\$0	\$837,094	\$837,094	0	19	19		
Cash	\$472	\$2,742,030	\$2,742,502	1	916	917		
Grand Total	\$472	\$3,579,124	\$3,579,596	\$3,579,596 1 935				

Termination - A withdraw all that is taken when the participant is active and terminating from employment or is already in a 'Terminated' status.

Death Distribution - Distribution taken by a beneficiary. This could include required minimum distributions, installment payments, etc.

Required Minimum Distribution - Minimum amounts that a participant must withdraw annually upon reaching a certain age or retirement. This would exclude any beneficiary or QDRO accounts.

Installment Payment - An Installment distribution is a payment option that disburses funds over time (i.e. monthly, quarterly, yearly).

Gross Adjustment - The total of all adjustments made to an account or plan in absolute terms, regardless of whether or not the adjustments were positive or negative.

In-Service Withdraw al - A distribution that is taken while the participant is still active, before termination from employment.

# **Plan Summary**



## **Participant Transaction Statistics**

	1/1/2020 - 3/31/2020	4/1/2020 - 6/30/2020	7/1/2020 - 9/30/2020	10/1/2020 - 12/31/2020
Call Center				
Unique Callers	101	64	69	48
Total Call Volume	171	130	121	99
Participant Website				
Unique Web Logins	176	128	124	123
Total Web Logins	1,090	848	673	658

Call Center Reason Category	1/1/2020 - 3/31/2020	4/1/2020 - 6/30/2020	7/1/2020 - 9/30/2020	10/1/2020 - 12/31/2020
Account Explanations	76	67	56	54
Allocation Changes & Exchange	1	0	0	0
Contributions	0	0	0	1
Disbursements	60	45	50	42
Enrollments	0	0	0	0
Forms	2	0	2	1
Fund Information	2	1	0	0
Hardships	0	1	0	0
IFX	0	1	0	0
IVR or Web Assistance	7	0	0	0
Loans	0	0	0	0
Other	1	4	2	0
Payment Questions	0	0	0	0
Plan Explanations	5	3	3	0
Regen Reg Letter	0	0	0	0
Status of Research	1	3	1	0
Tax Information	14	5	5	1
Website Processing	2	0	2	0
Total	171	130	121	99

#### **Definitions:**

**Unique Callers** – The number of individuals that spoke to a Participant Service Center Representative during the reporting period (e.g., If the same individual called five times during the reporting period, they would only be counted once).

**Total Call Volume** – The number of calls to a Participant Service Center Representative during the reporting period (e.g., If the same individual called five times during the reporting period, they would be counted five times).

# **Plan Summary**

### State of Vermont



Assets and contributions reflect actual participant account balances and do not include outstanding loan balances, forfeitures, and / or expense account assets.

Customer should promptly report any inaccuracy or discrepancy to the brokerage firm(s).

All oral communications should be re-confirmed in writing to protect the customer's legal rights, including rights under the Securities Investor Protection act (SIPA).

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Prudential's Book of Business averages are as of 12/31/2019.



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